



CASE STUDY

GLOBAL

Professional
Services Firm



Achieving Cloud Transformation Across 160 Countries Without Disruption to Business Continuity


The Problem

*This global professional services firm delivers time-sensitive financial services to clients in over 150 countries. They faced a problem familiar to many enterprises: **declining legacy platforms with outdated functionality.***

Core platforms developed 15-20 years ago no longer reflected current business processes. Data synchronization issues limited the visibility of critical information. Due to system limitations, users became accustomed to using inefficient or counterproductive workflows and had to maintain business-critical information in external spreadsheets or other reporting systems. The additional administrative burden for business and technical users led to higher costs and user frustration, negatively impacting service delivery. The client struggled to manage the needs of its business, including workflow management, local country autonomy, automation, and global data accessibility for local compliance. Before long, the client realized these legacy platforms were limiting their ability to stay competitive.

CASE STUDY: Achieving Cloud Transformation Without Disruption to Business Continuity

The client issued a request for a proposal for a comprehensive digital transformation strategy and roadmap focused on modernizing two mission-critical applications. After a thorough and competitive evaluation process, T4S Partners was selected to deliver a digital transformation solution to put the client on the right path.



T4S won the work because the client recognized our deep experience with similar programs. They also appreciated T4S's holistic approach to transformation that focused on business, technology, and program management.

The Journey

T4S began with a four-month planning and strategy engagement with this client to understand the client's desired outcomes, agree on the technical direction, and create a comprehensive application transformation blueprint to guide the project. The blueprint included future-state business process flows, application build vs. buy recommendations, technical architecture models, integration strategies, staffing and costing models, deployment plans, and a return on investment (ROI) model.

The client found great and lasting value in the proprietary ROI model developed by T4S in collaboration with client's executive leadership. The ROI model answered several key questions that were used to drive the business case:

- ⇒ **Which features and value propositions in the new system will have the greatest impact?**
- ⇒ **How much could the new system support organization-wide efficiency, reducing costs?**
- ⇒ **How much could a fully automated solution impact revenue and service delivery quality?**
- ⇒ **How could a new solution increase employee productivity and job satisfaction?**

CASE STUDY: Achieving Cloud Transformation Without Disruption to Business

Backed by these planning efforts, with continued advisory support from T4S, the client secured funding for this multi-year transformation program. The client retained T4S to deliver its technology modernization and digital transformation program. The close partnership developed in the first year together proved essential as the work unfolded over the next four years.

The initial phase of the project focused on the user-centered design of the new solution. T4S collaborated with the client to identify forward-looking influential leaders representing larger and smaller countries; they were recruited to drive the new solution design and become internal champions for change. During this phase, T4S led a series of innovative user-centered design workshops across the Americas, Europe, and Asia-Pacific regions. During these fast-paced design sessions, client experts from each region worked with their colleagues and T4S experts to collectively design business solutions to meet their needs. Differences across larger

and smaller countries gave rise to innovative application features such as flexible dashboards and workflow design. From a development standpoint, these sessions were critical to enabling T4S to design a system that fully meets the needs of such a diverse set of stakeholders.

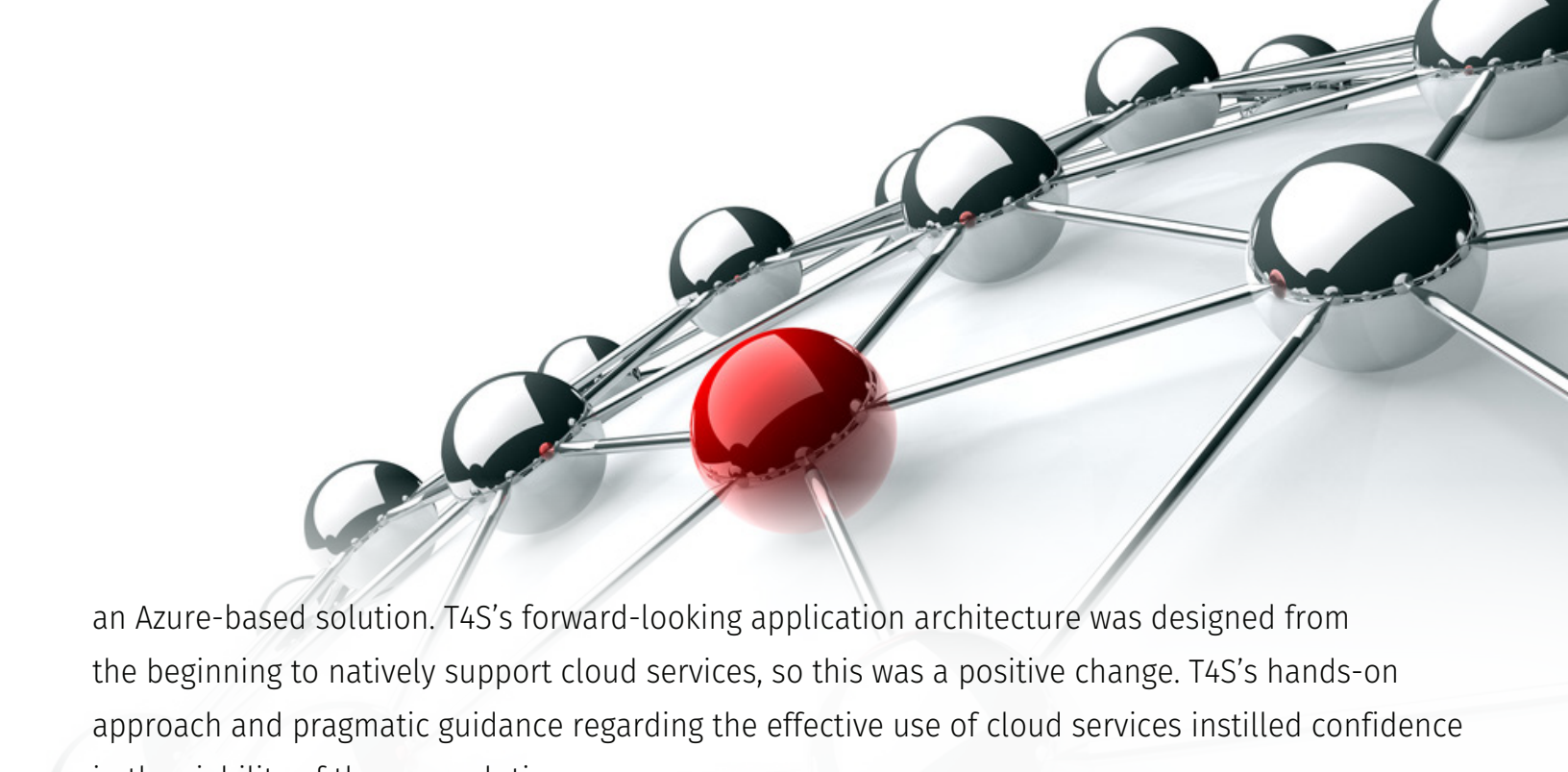
This collaborative approach created a strong business stakeholder community and early

excitement for the new solution. T4S helped the client's product owner to keep stakeholders actively engaged throughout the development process. Regular meetings were held to review application prototypes or early releases, solicit feedback, and communicate progress. Stakeholders also participated in user

acceptance testing. In their own words: "We are impressed at how well you understand our business. You use our terms so we can talk freely without changing our language".

This client was initially risk-averse to cloud technology. However, within a year, an internal culture shift prompted them to fully embrace





an Azure-based solution. T4S's forward-looking application architecture was designed from the beginning to natively support cloud services, so this was a positive change. T4S's hands-on approach and pragmatic guidance regarding the effective use of cloud services instilled confidence in the viability of the new solution.

The Solution

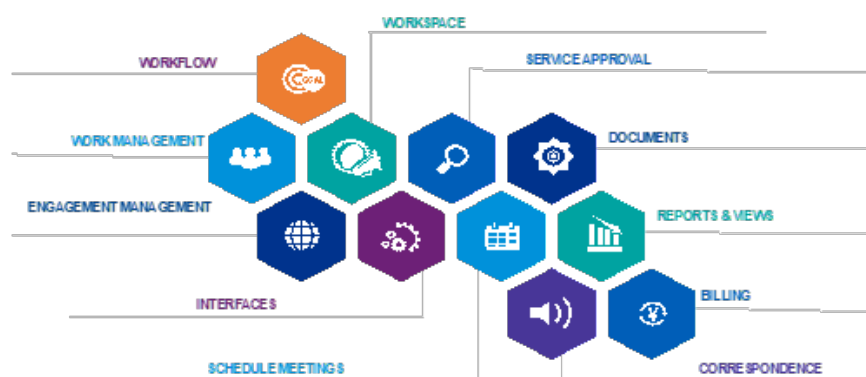
T4S Partners created a custom, cloud-native, globally distributed workflow platform that provides complete visibility and alignment between the client's 150+ countries across the globe. This microservices-based application provides a wealth of features for automation, security, performance, and high availability. These include:

- ⇒ **Cloud-native microservices solution built on Microsoft Azure (platform-as-a-service)**
- ⇒ **Configurable workflows using global templates with support for country extensions**
- ⇒ **Enforcement of global compliance control with local extensions for data fields, operational KPIs, and client communications**
- ⇒ **Flexible workflow management and automation processes**
- ⇒ **Role-based access control with support for domain-specific data access restrictions**
- ⇒ **Agile work management models and role-specific dashboards for operational support**
- ⇒ **Data management for regional data hosting, access control, and auditing**
- ⇒ **Integration with legacy applications to enable co-existence during the multi-year transition**
- ⇒ **Robust API models for integration to legacy and future applications**

CASE STUDY: Achieving Cloud Transformation Without Disruption to Business Continuity

From the beginning of the program, this client and T4S recognized that a digital transformation of this magnitude would involve many business and technical challenges. With thousands of users across the globe delivering time-sensitive financial services to their clients, our client leadership understood that it would take time to transition all users across all countries to the new application. Maintaining continuity during a prolonged transition (co-existence) period was core to the project's success; significant downtime during the transition to the new system would be unacceptable. T4S fully understands the importance of maintaining business continuity during digital transformation and we have substantial experience with this type of challenge. We added application features for country-specific configuration, data priming, and migrating in-flight projects to the new solution. Armed with these features, the client created an "onboarding toolkit" to help each country prepare to use the new system in ways that work best for them. We also worked with our client to design a deployment strategy allowing countries to be onboarded to the new system independently or in strategic "waves." The client continues to use this rolling deployment approach to onboard countries across the globe.

The Results



T4S designed a highly configurable system for global compliance control with local extension ability. Backed by flexible application management tools, the application includes robust security and dashboards for proactive monitoring and integrated data visibility. T4S's solution makes

it easy to add new workflow processes, dashboards, communications, KPIs, or integrations to the system. Countries can tailor and localize workflows, adjust SLAs, maintain custom communications, and use dashboards for client reporting. With a cloud-based architecture, computing capacity can be scaled up or down as business needs change. Data locality can also be restricted as required to support country data residency requirements.

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For the final phase of their engagement, T4S conducted a series of in-depth knowledge transfer sessions with the client's delivery team. Topics included application business requirements and design goals, microservices architecture and design, how the Azure services are used in the solution, and how to troubleshoot issues. These were followed by daily mentoring and collaborative co-development sessions with the client's delivery team. Over time the client's developers became self-sufficient. They took on ownership of the new application's design. They added enhancements to the solution. Now they can flexibly respond to our client's business needs and address any issues that may arise.

Throughout this journey, we've gone from ideas on a napkin to a production-quality system. T4S helped this client completely redesign two legacy mission-critical applications. We created a streamlined, modern application that supports current and future business needs. We delivered the solution using leading-edge Azure cloud technologies. We introduced domain-driven design, microservices, and other application design patterns optimized for the cloud. We delivered the transformation program in a complex, globally distributed program management environment. T4S's forged a strong partnership with this client, built on our shared history of creative problem-solving, technical management expertise, and an ongoing commitment to excellence.

"It is with great sadness to me that our time together on [this] project has come to an end. I am confident [our solution] will be successful as we deploy it in the coming months and use it for many years to support our global business. I am also confident the project would have failed without the incredible partnership, dedication, professionalism, skills, and sheer determination of the entire T4S Partners team."

- Client Product Owner and Project Manager



Need a partner who can improve your day-to-day functionality?

Contact T4S for a consultation

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